

Implement and Manage CRM Analytics ANC301

Take your Tableau CRM skills to the next level. In this expert-led course, you'll learn how to develop and implement a Tableau CRM environment that includes both Salesforce and non-Salesforce data. You'll be guided through Tableau CRM features and settings, setting up users, loading and transforming data, data security, and modifying queries to customize dashboards so you can work more efficiently, spot trends, and predict results faster.

Course Contents

- Discovery and Planning
- Set Up Users and Apps
- Connect Data
- Data Security
- Extended Metadata in a Dataset
- Dashboard Templates and Mobile Dashboards
- Bindings in Dashboards
- Query Modification

E-Book You will receive the original course documentation by Salesforce as an e-book.

Target Group

This course is ideal for integration specialists or Salesforce administrators who want to learn more about connecting and securing data in Tableau CRM. This course is also great for business analysts or developers interested in creating advanced dashboards.

Prerequisites

Prepare for the course with this Salesforce Trailmix.

Course Target

After completing this course, you will be able to:

- Determine your user, data, and security requirements and establish a development process
- Set up apps and control what users can do in Tableau CRM by assigning them licenses, permission sets and app permissions.

This Course in the Web



You can find the up-to-date information and options for ordering under the following link:

www.expertech-training.com/go/SFA3

Reservation

On our Website, you can reserve a course seat for 7 days free of charge and in a non-committal manner. This can also be done by phone under +49 6074/4868-0.

Guaranteed Course Dates

To ensure reliable planning, we are continuously offering a wide range of guaranteed course dates.

Your Tailor-Made Course!

We can precisely customize this course to your project and the corresponding requirements.

Training	Prices, excl. of V.A.T.	
Classes in Germany	3 Days	€ 2,175
Online Training	3 Days	€ 2,175
Dates upon request		

Status 04/26/2025



EXPERTech



Our Training Offer for You:



Classroom Training

The live training experience in our training centers or on your premises on-site.



Online Training

Attend your course in online mode – without travel and accommodation expenses and effort.



Hybrid Training

Classroom & online in one course – choose how you wish to participate in your training event.



In-house Training

We create your customized training concepts for your project.



Guaranteed Course Dates

ExperTeach guaranteed course dates allow for secure and reliable planning.

Awards Won by ExperTeach



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